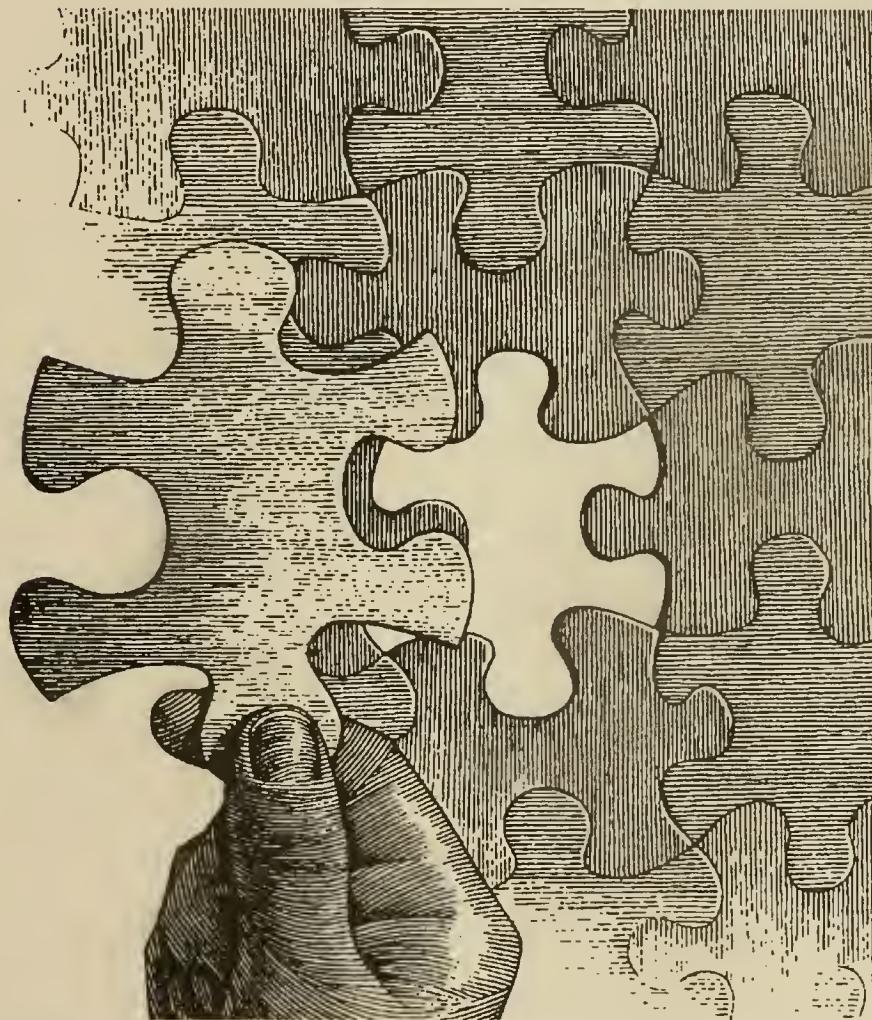


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# OFFICE OF PUBLIC INSTRUCTION: PUTTING IT ALL TOGETHER



A Report on the 1989-1990 Study of the  
Office of Public Instruction  
Nancy Keenan, Superintendent  
State of Montana

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## Preface

In June of 1989, Nancy Keenan and her management team identified a need for input from staff to identify methods to improve the Office of Public Instruction. The management team selected the IBM Application Transfer Study (ATS) process to facilitate these improvements. The Application Transfer Study methodology is a free service offered by IBM to assist educational organizations in the development of long-range management plans. The ATS is a team process which identifies concerns, their related causes and effects, plus, provides solutions and benefits.

The key element of this structured process is staff input. Staff responses are processed into major issues, and these issues form the foundation for the study team's assignment. The end result of this specialized planning process is a formal list of recommendations to Superintendent Keenan. These recommendations are presented in a task-related format and compiled in this report.

A very faint, large watermark-like image of a classical building with four prominent columns and a triangular pediment occupies the background of the page.

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## **STUDY TEAM MEMBERS**

Nancy Keenan, Superintendent.....Executive Sponsor  
Julia Brighton.....Study Team Member  
Curly Burns.....Study Team Member  
Scott Buswell.....Study Team Member  
Nancy Coopersmith.....Study Team Member  
Gregg Groepper.....Study Team Member  
Nona Rens.....Study Team Member  
Bob Foster.....IBM Education Marketing Representative  
Jerry Ollinger.....IBM Application Transfer Study Specialist  
Bill Roberts.....IBM Systems Engineer  
Randle Romney.....IBM Branch Manager  
Price Williams.....IBM Marketing Manager



# The Office of Public Instruction

Nancy Keenan  
State Superintendent



State Capitol  
Helena, Montana 59620  
(406) 444-3095

## ACKNOWLEDGEMENTS

I extend my heartfelt thanks to the many staff and district personnel who gave freely of their time to complete the initial questionnaire and participate in the group interviews. The study team interviewed 99 members of the Office of Public Instruction staff and 39 teachers, administrators, clerks and trustees. Without the cooperation and input of these individuals, this report could not have been attempted.

The completion of this report was made possible by the extraordinary efforts of the study team. Their concentrated deliberations over a four-month period required a substantial commitment of time and energy. The breadth of vision, as outlined in this report, is a compliment to the caliber of personnel on this team.

The guidance provided by the IBM consultants was essential to the success of this study. Special acknowledgement is given to Jerry Ollinger, Application Transfer Study (ATS) Specialist, who brought the process methodology and continually kept the team focused. The technical knowledge of Bill Roberts, and support of Price Williams and Bob Foster, have been vital to the project. I especially appreciate the extra effort on the part of these individuals to assist in solving our network problems throughout the course of this study.

Special thanks are given to Carol Ogle and the other word processing staff, whose considerable efforts kept the word processing work current, to Jan Thomson who produced charts and graphs which were used by the study team and which appear in the final report, and to Sanna Porte Kiesling who created the cover and title pages. I also appreciate the hospitality provided by the student services division of the Salish Kooteni Community College for the use of their conference facilities during the field interviews.

I welcome the challenge of working with staff to implement the recommendations contained in this report. The possibility exists that we may not be successful in implementing all the recommendations. However, the risk of failure is small compared to the potential for improvements in the quality of education in Montana.

*Nancy Keenan*

Nancy Keenan  
Superintendent



## Interview Participants



## OFFICE OF PUBLIC INSTRUCTION INTERVIEW PARTICIPANTS

The following is a list of individuals who participated in the interview process.

| CURRICULUM SERVICES | Marlene Wallis    | SUPERINTENDENT'S OFFICE |
|---------------------|-------------------|-------------------------|
| June Atkins         | Jim Whealon       |                         |
| Susan Bailey        | Jeff Wulf         |                         |
| Judy Birch          | Cary Youpee       | Linda Brandon           |
| Angela Branz-Spall  |                   | Scott Campbell          |
| Terry Brown         |                   | Lori Clark              |
| Nica Carte          |                   | Sue Dandliker           |
| Mike Chapman        | Grafton Beasley   | Barry Farrell           |
| Claudia Clifford    | Kathy Benson      | Kathleen Holden         |
| B.J. Combest        | Cheri Bergeron    | Sanna Kiesling          |
| Merle DeVoe         | Lynda Brannon     | Alicia Pichette         |
| Dan Dolan           | Fran Briggeman    | Rosemary Riddock        |
| Thornton Durkee     | Teresa Cohea      | Marilyn Roberts         |
| John Erickson       | Sherry Decker     | Cebe Sobonya            |
| Dick Field          | Margaret Dunham   | Thea Van Nice           |
| Ann Ford            | Dorothy Farrell   | Cheryl Whealon          |
| Fanny Gordon        | Ann Ferguson      |                         |
| Curt Hahn           | Rose Frisbee      |                         |
| Michael Hall        | Delma Gillam      |                         |
| Lynn Hinch          | Bill Hallinan     |                         |
| Duane Jackson       | Gail Hansen       |                         |
| Janet Klecker       | Michael Hultin    |                         |
| Karen Kuster        | Sofia Janik       |                         |
| Lynnette Lake       | Pam LaFountaine   |                         |
| Brian Lombardi      | Janet Miller      |                         |
| Mary McAulay        | Bob Morris        |                         |
| Jay McCallum        | Maxine Mougeot    |                         |
| Dan McCarthy        | Dori Nielson      |                         |
| Jim Meier           | Jim Oberembt      |                         |
| Dave Miller         | Carol Ogle        |                         |
| Kathy Mollohan      | Jean Pfeffer      |                         |
| Bob Parsley         | Peggy Rost        |                         |
| Dolores Patton      | Sioux Roth        |                         |
| Sue Paulson         | Del Ruggles       |                         |
| Marilyn Pearson     | Harrie Sherwood   |                         |
| Pat Pickett         | Tom Simmons       |                         |
| Marion Reed         | Mary Jane Spiroff |                         |
| Robert Ruthemeyer   | Colette Stebleton |                         |
| Spencer Sartorius   | Sylvia Stevens    |                         |
| Betty Smith         | Connie Stine      |                         |
| Karen Spranget      | Jan Thomson       |                         |
| Karen Sullivan      | Ken Toole         |                         |
| Terry Teichrow      | Carol Vashro      |                         |
| Joyce Thompson      | Gary Watt         |                         |
| Laurie Volesky      |                   |                         |
| Pat Wade            |                   |                         |

## FIELD INTERVIEW PARTICIPANTS

|                    |                |
|--------------------|----------------|
| Rick Baird         | Bigfork        |
| Mike Boshka        | Bigfork        |
| Sue Ebing          | Bigfork        |
| Judy Hadlock       | Bigfork        |
| Steve Racki        | Bigfork        |
| Shirley Best       | Bigfork        |
| Paul Sullivan      | Bigfork        |
| Eleanor Pulcini    | Bigfork        |
| Judy Koppang       | Bigfork        |
| Don Faris          | Bigfork        |
| Gail Atkinson      | Cayuse Prairie |
| Janet Pine         | Cayuse Prairie |
| Sandra Wrightson   | Columbia Falls |
| Sally Newberry     | Helena Flats   |
| Glennadene Ferrell | Polson         |
| Steve Nelson       | Polson         |
| Marion Daley       | Polson         |
| Pam Owens          | Polson         |
| Bud Veis           | Polson         |
| Elaine Meeks       | Polson         |
| Carol Brubaker     | Proctor        |
| Jim Gillhouse      | Ronan          |
| Terri O'Fallon     | Ronan          |
| Harry Goldman      | Ronan          |
| Darlene Watkins    | Ronan          |
| Bob Halgren        | Ronan          |
| David Spence       | Ronan          |
| Katie James        | Ronan          |
| Barry Baker        | Ronan          |
| Lonnie Smith       | Ronan          |
| Celie Call         | Ronan          |
| Kathy Pierce       | Somers         |
| Sherry Pasquale    | St. Ignatius   |
| Pat Murphy         | St. Ignatius   |
| David Werdin       | St. Ignatius   |
| Jack McLeod        | West Valley    |
| Jennine Budge      | Whitefish      |
| Betsy Whanger      | Whitefish      |

## **Executive Summary**



## **EXECUTIVE SUMMARY**

The report you are about to read contains recommendations which, if implemented, will significantly improve and strengthen the Office of Public Instruction.

The report is also an explanation of process. If one accepts the process as valid, then the recommendations for improvement must be considered representative of the staff of the Office of Public Instruction and the school personnel interviewed.

The study team consolidated the results of over 100 staff interviews and 40 field interviews into five general issue areas and a requirement statement, or goal, for each area. Those areas and goals are:

### **1. Quality of Education**

Develop an educational system which adequately prepares our students for today and for the future.

### **2. Communications**

Develop effective two-way communications among staff, management, districts, other agencies, parents, community and business.

### **3. Management Leadership**

Develop, communicate and implement management practices which establish the Office of Public Instruction as the leader for education in Montana.

### **4. Training**

Assess, develop, implement and commit to a comprehensive staff and management training program which increases the effectiveness of the Office of Public Instruction staff and management.

### **5. Statewide Information Network**

Develop and implement a comprehensive integrated information/communication system that allows for timely and accurate distribution of information.

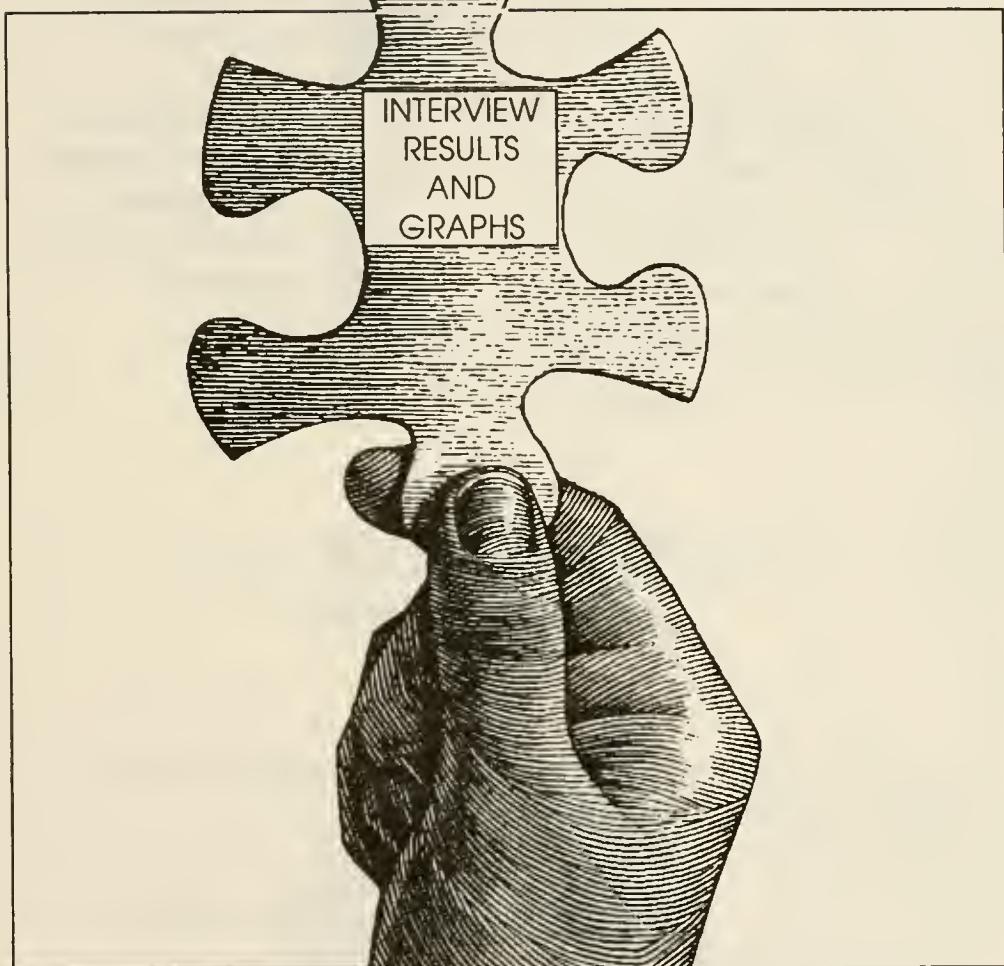
Pages 19 through 30 summarize cause, effect, solutions and benefits for each of the general issue areas.

The recommendations section of the report (pages 31 through 41) provides the reader an expanded list of recommendations in each of the issue areas. It is important to understand these recommendations for improvement come directly from the staff and field interviews.

A set of goals and recommendations, alone, have little value without a plan of action to implement recommendations and, accordingly, achieve the goals. The final section of the report sets forth the specific tasks, costs, timing and recommended individuals responsible for setting the tasks in motion.

To accomplish each goal, several tasks are recommended. Timing is a major consideration because all the staff have additional responsibilities beyond the recommended assignments. The report attempts to take those factors into consideration. This section (pages 43 through 57) is the heart of the report and should be read in its entirety.

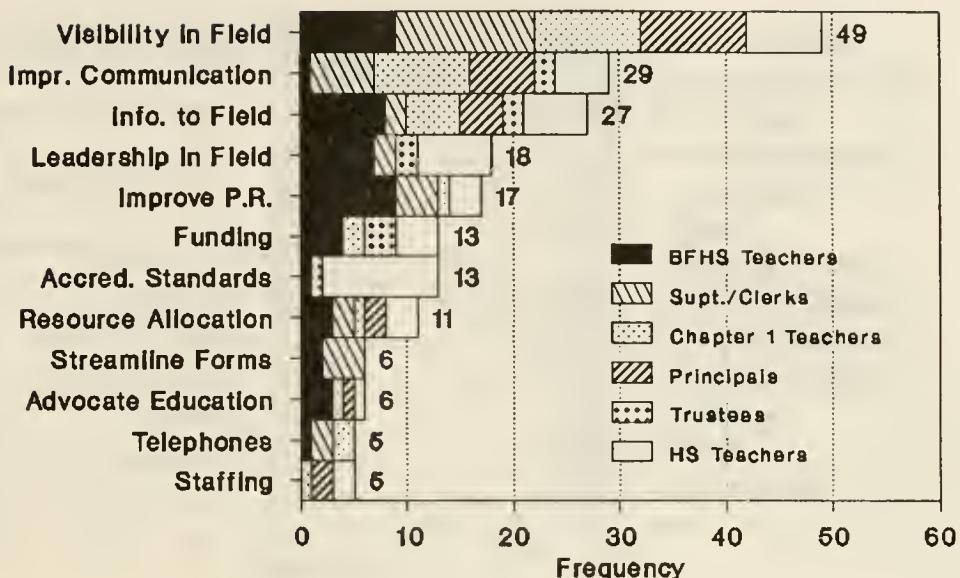
## OPI: PUTTING IT ALL TOGETHER





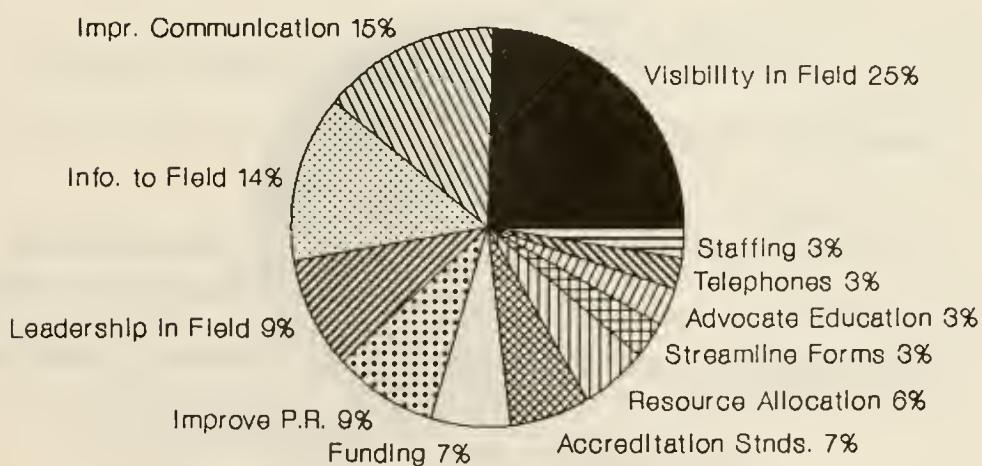
## CONCERNS

### Field Interviews



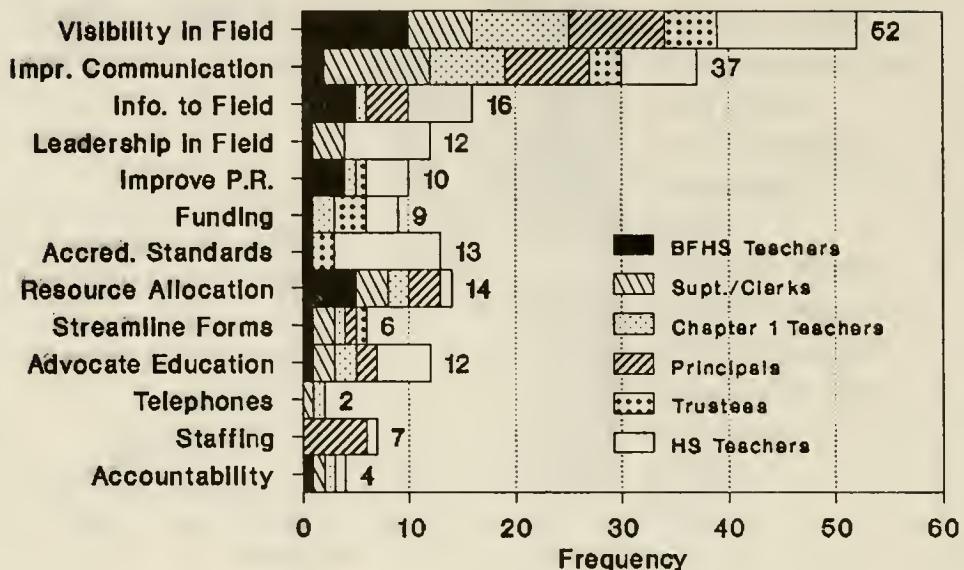
## CONCERNS

### Field Interviews



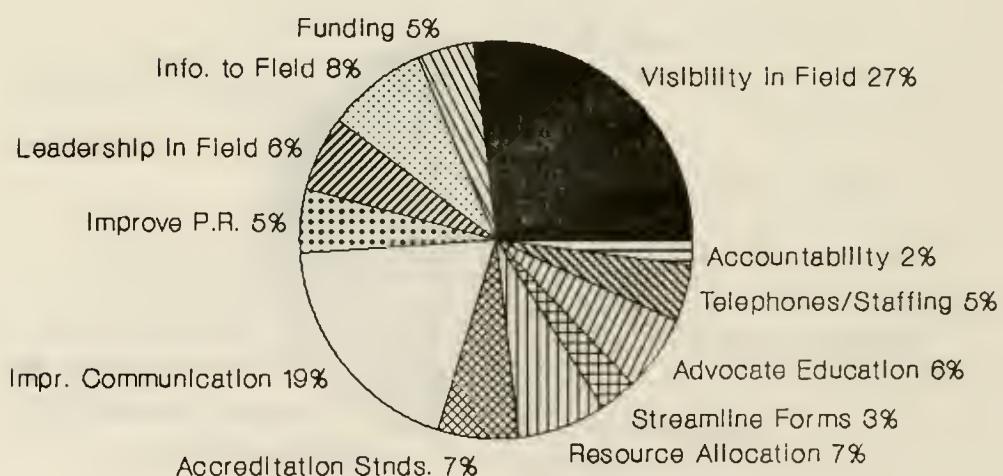
# RECOMMENDATIONS

## Field Interviews

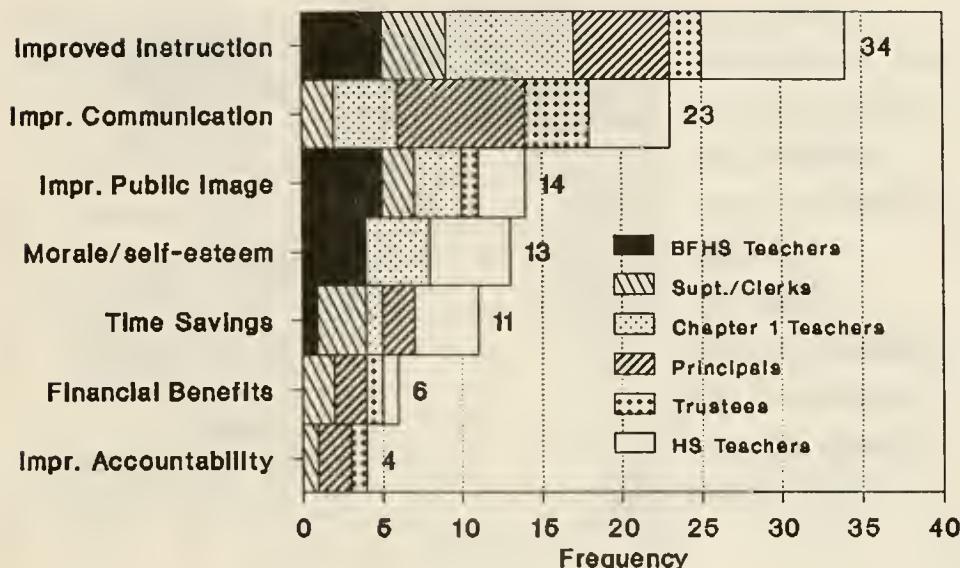


# RECOMMENDATIONS

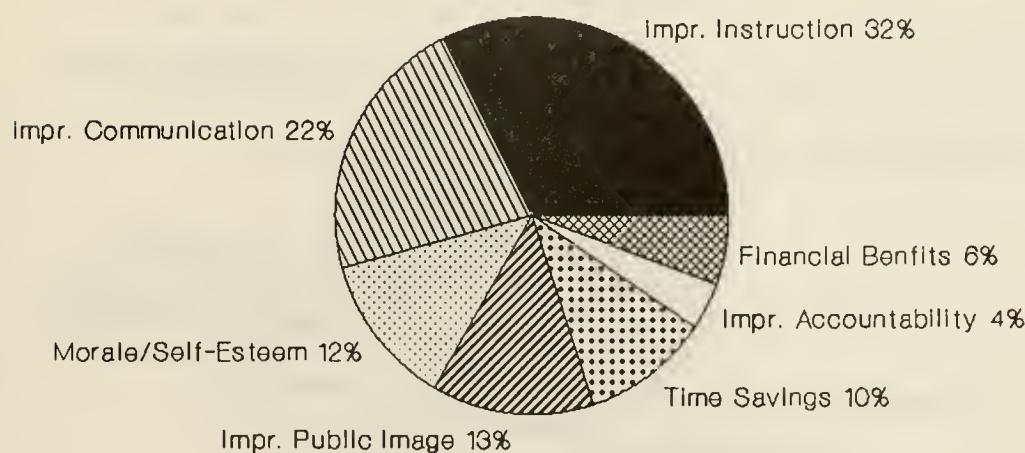
## Field Interviews



## BENEFITS Field Interviews

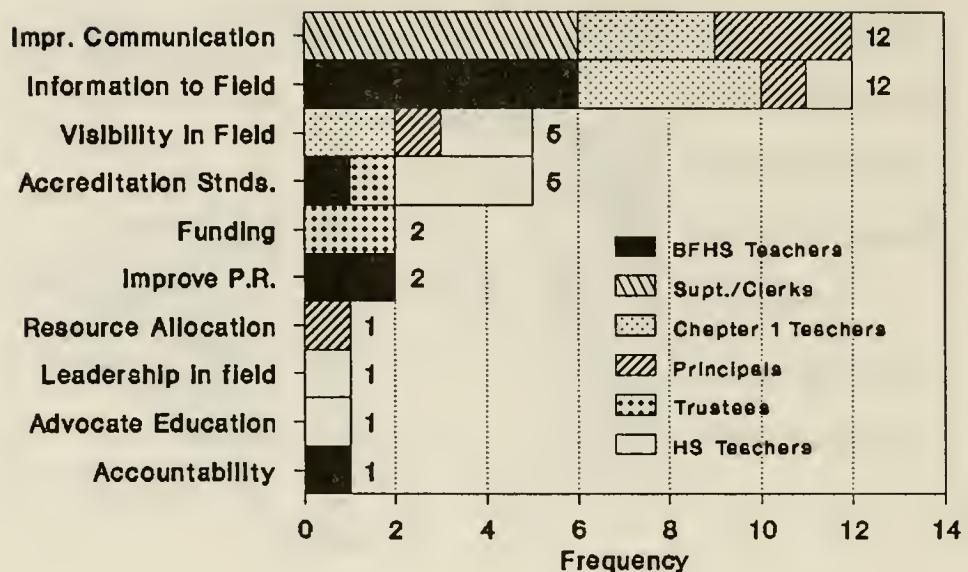


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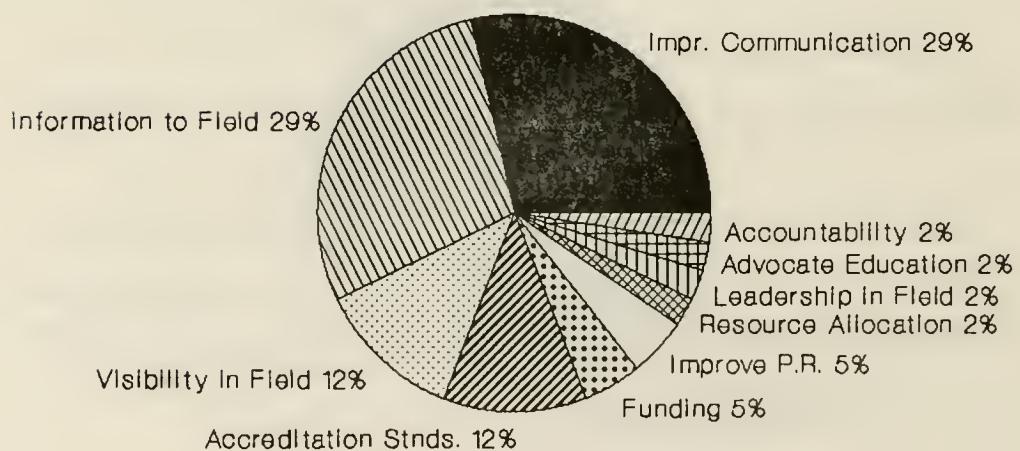
# PRIORITIES

## Field Interviews



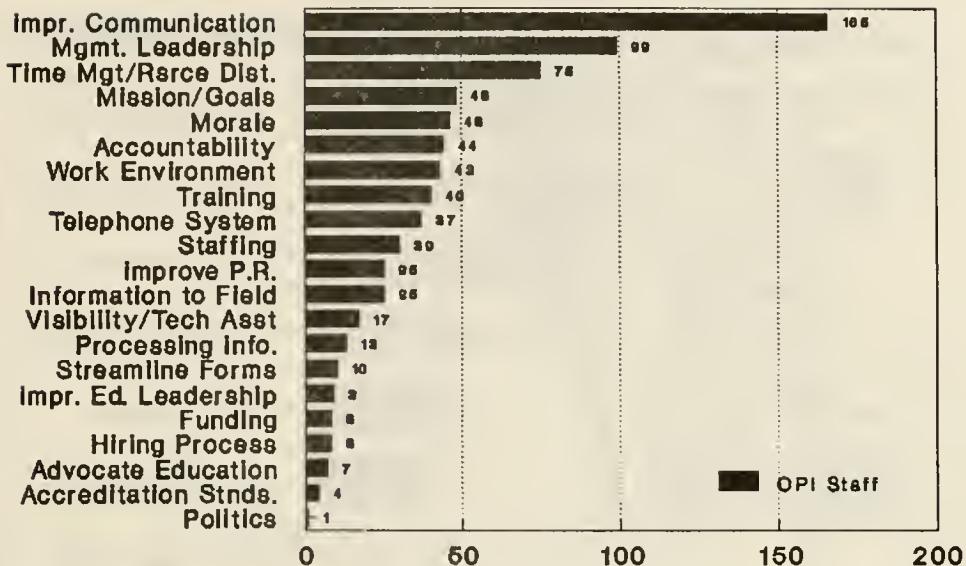
# PRIORITIES

## Field Interviews



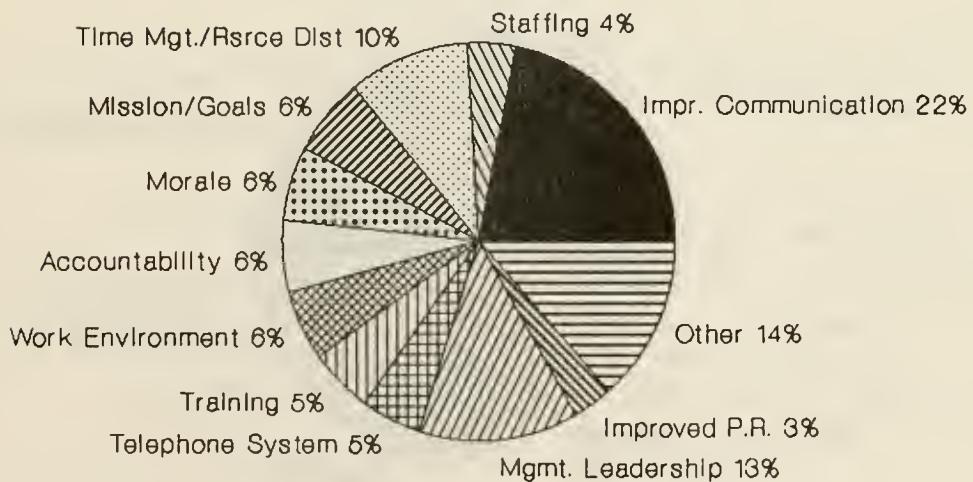
# CONCERNS

## Staff Interviews



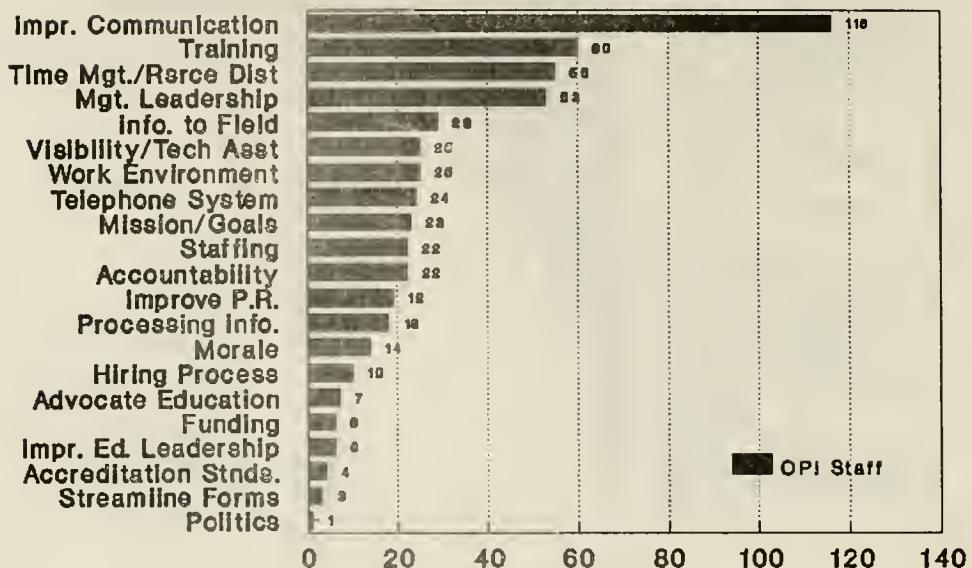
# CONCERNS

## Staff Interviews



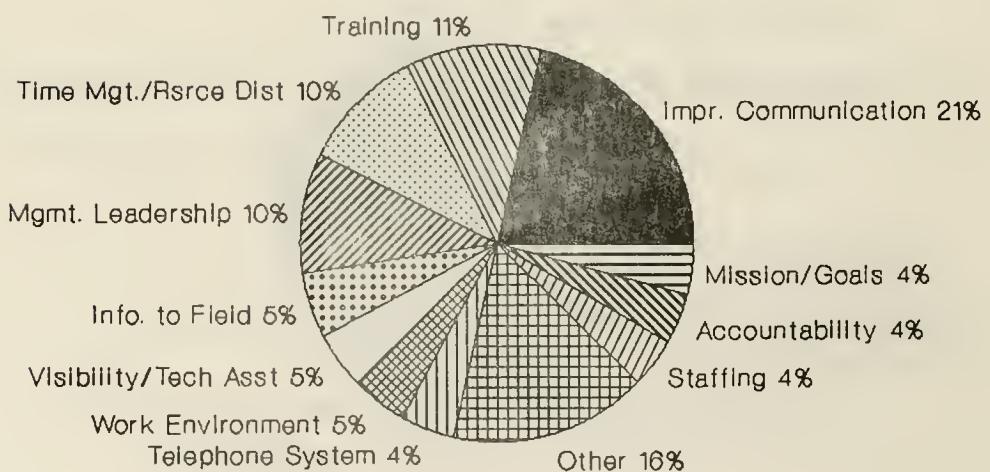
# RECOMMENDATIONS

## Staff Interviews

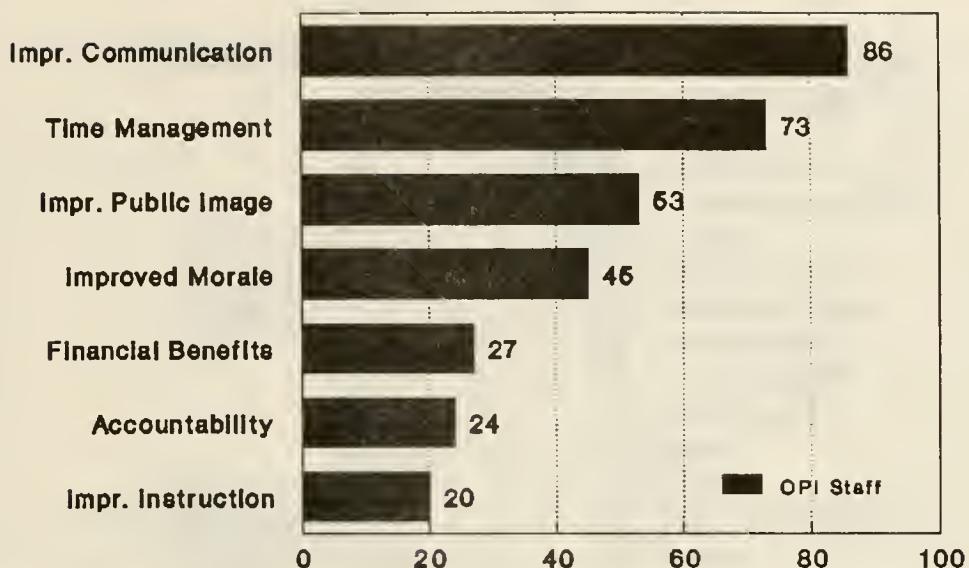


# RECOMMENDATIONS

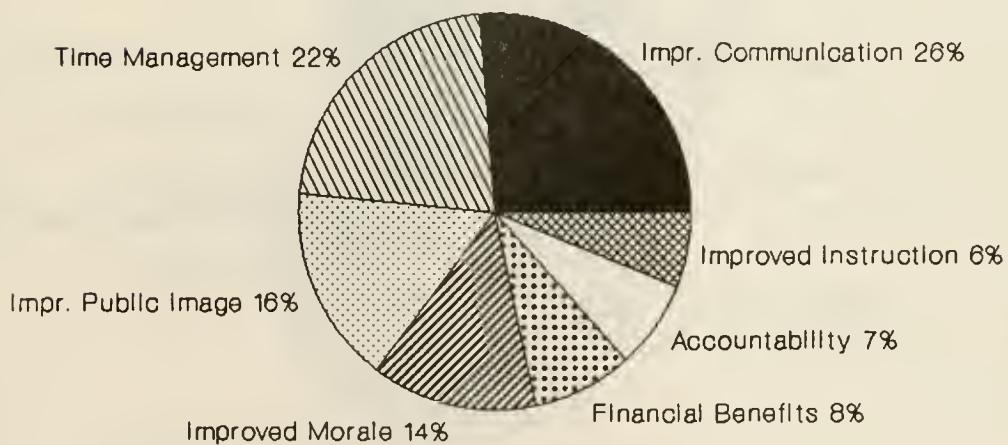
## Staff Interviews



## BENEFITS Staff Interviews

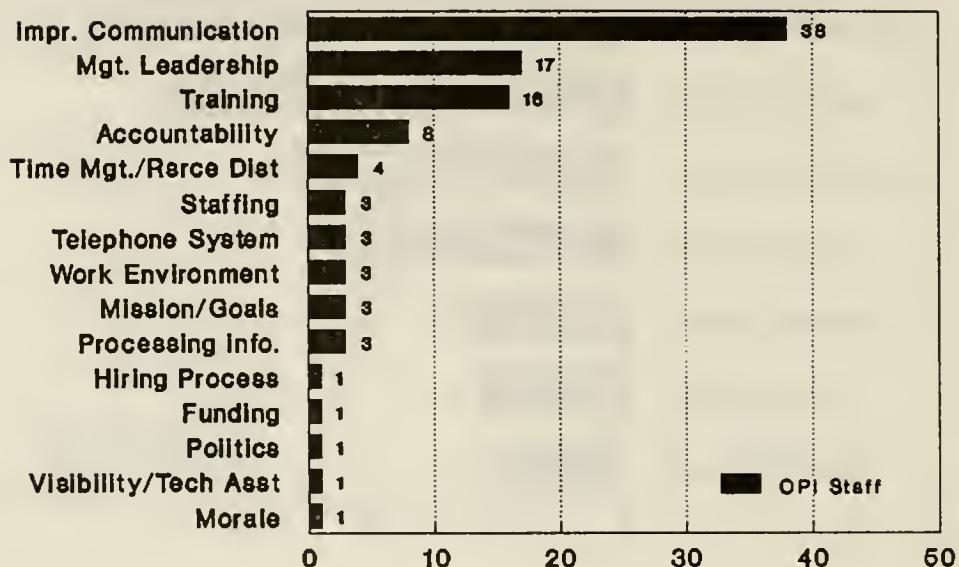


## BENEFITS Staff Interviews



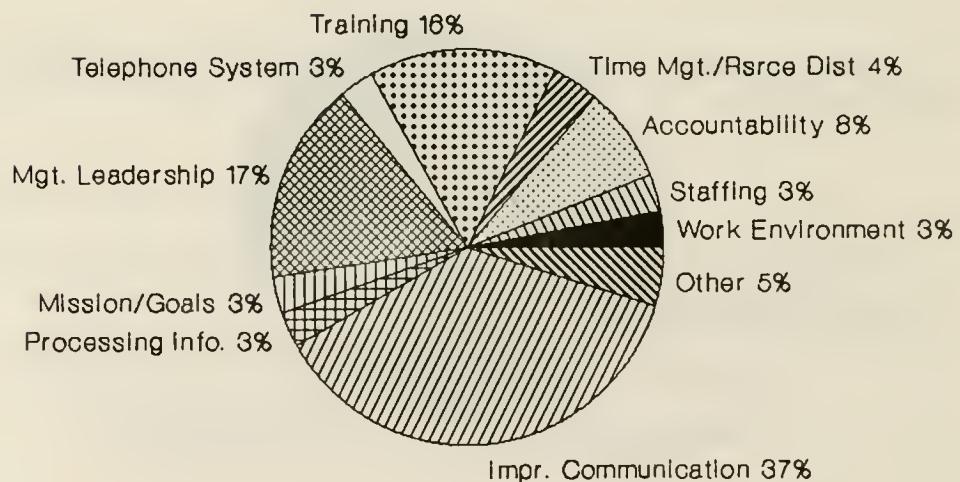
# PRIORITIES

## Staff Interviews

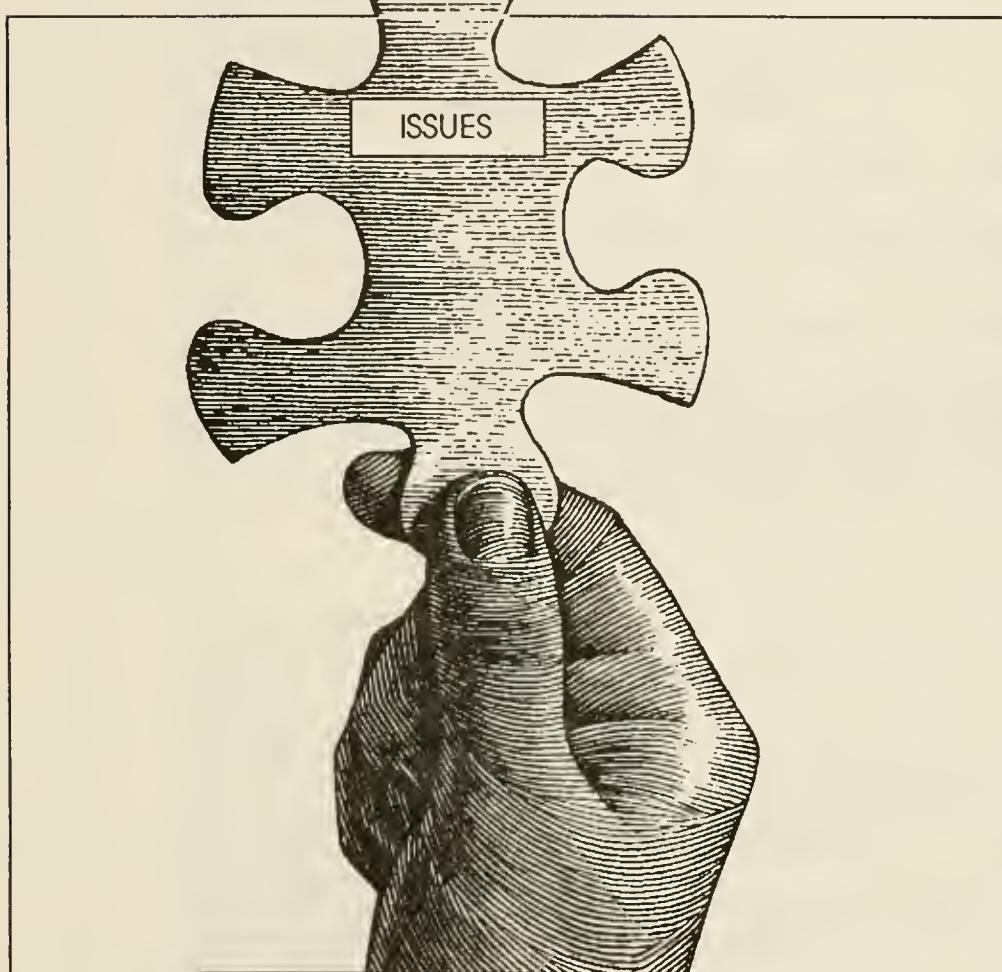


# PRIORITIES

## Staff Interviews



## OPI: PUTTING IT ALL TOGETHER





## 1. QUALITY OF EDUCATION

### CONCERN DEFINITION

The educational system may not adequately prepare our students for today and for the future.

#### A. Causes

- No vision for education
- No agreement on goals
- Lack of long-range planning
- Low expectations for students, teachers, supervisors
- Limited public support for funding
- Inadequate curriculum materials for classroom teachers
- Inability of classroom teachers to stay current in their area
- No recognition for effective schools/programs/teachers
- Lack of accountability
- Inadequate school personnel training (teachers/principals/ superintendents)
- Inadequate management training for school managers
- Inadequate technical assistance for school districts
- Lack of involvement in the educational process by all parties (parents, businesses, staff)

#### B. Effects

- Unemployment
- Less productive society
- Difficult to attract business and industry
- Reduced level of funding
- Cannot compete economically
- Search for alternatives to public education
- Increased expenditure for public support services
- Students do not reach their potential
- Inefficient use of resources
- Quality of life/education eroded over time
- Education has a poor public image
- Educators held in low esteem by public

## REQUIREMENT STATEMENT

Develop an educational system that adequately prepares our students for today and for the future.

### A. Solutions

- Develop and communicate a vision for education
- Develop agreement on education goals
- Develop and implement accountability standards tied to educational goals
- Provide adequate school personnel training
- Provide adequate management training for school managers
- Increase involvement in the educational process by all parties (parents, business, and staff)
- Improve long-range planning
- Provide adequate technical assistance for school districts
- Develop realistic expectations of students, teachers and supervisors
- Increase support for funding
- Provide classroom teachers with adequate curriculum materials
- Provide classroom teachers with the opportunity to stay current in their areas
- Provide recognition for effective schools, programs, teachers

### B. Benefits

- Lower unemployment
- More productive society
- Greater ability to attract business and industry
- Improved level of funding
- More competitive economically
- Reduced need for alternatives to public education
- Reduced expenditures for public support services
- More students reach their potential
- More efficient use of resources
- Improved quality of life/education
- Improved public image of education
- Educators held in higher esteem by the public

## 2. COMMUNICATIONS

### CONCERN DEFINITION

Communications are ineffective between staff, management, districts, other agencies, parents, community and businesses.

#### A. Causes

- No written policies
- Job descriptions not current
- No formal telephone procedures
- Lack of training
- Poor telephone system
- No mission statement/goals
- Geographical distances in state
- Office of Public Instruction housed in five locations
- Inadequate management/staff communications process
- Clear staff/management roles and responsibilities not established and communicated
- Inadequate or incompatible equipment internally and externally
- Inaccessibility of management staff internally and externally
- Publications not targeted to needs of audience
- Publications do not reach the people who need them
- Infrequent/ineffective staff meetings
- Multiple/duplicative/confusing forms
- No feedback to information providers
- Reporting time frames unreasonable
- Reporting time frames not effectively communicated
- No coordinated reporting effort
- "Good news" in education not emphasized
- Staff strengths and resources not communicated

#### B. Effects

- Poor staff morale
- Time and resources wasted
- Become reactive not proactive
- Loss of credibility
- Diminished leadership role in education
- Poor public image
- Work does not get done
- Duplication of effort
- Quality of education diminished
- Missed funding opportunities
- High level of frustration
- Poor service to districts/legislature
- Poor decisions

- Work is not directed to priority tasks
- Inconsistent, erroneous information to the field and within the Office of Public Instruction
- Fragmented departments do not work as a team

#### REQUIREMENT STATEMENT

Develop effective two-way communications among staff, management, districts, other agencies, parents, community and businesses.

#### A. Solutions

- Develop written policies
- Update job descriptions
- Develop formal telephone procedures
- Provide adequate, timely training and staff backup
- Fix the telephone system
- Develop and communicate goals and mission statement
- Explore ways to reduce impact of remoteness from field
- Consolidate the Office of Public Instruction staff in one location (site)
- Develop and implement effective two-way communications between management, staff, and the field
- Identify, establish and communicate roles of management and staff
- In concert with the field, develop an Information Systems plan which includes hardware/software acquisition standards
- Target publications to need of audience
- Personalize mailing lists for publications to ensure it gets to end users
- Hold effective, frequent staff meetings
- Implement a comprehensive forms review process
- Provide feedback to information providers
- Standardize and communicate reporting deadlines
- Standardize reporting requirements
- Develop standard definitions for data
- Emphasize good news in education
- Publish and distribute a staff resource manual to the field
- Require work plans, with regular updates

#### B. Benefits

- Improved staff morale
- Effective use of time and resources
- Proactive, not reactive
- Increased credibility as state leader for education
- Improved public image
- Increased productivity

- Increased productivity
- Minimize duplication
- Enhanced quality of education
- Increased funding opportunities
- Reduced stress
- Better services to districts and legislature
- Better decisions
- Work directed to priority projects
- Accurate information to field and the Office of Public Instruction
- Coordinated, unified staff working as a team

### **3. MANAGEMENT LEADERSHIP**

#### **CONCERN DEFINITION**

Direction and leadership in education and office management practices are inadequate at the Office of Public Instruction.

#### **A. Causes**

- No articulated goals and mission statement
- Performance appraisals not tied to goals and mission statement
- No mechanism for staff input
- Outdated job descriptions
- Lack of management visibility
- No written policies and procedures
- Ineffective conflict resolution process
- Poor planning
- Ineffective communications
- Inadequate training in management practices
- Lack of staff recognition program
- Staff in five locations

#### **B. Effects**

- Poor image for the Office of Public Instruction and for education
- Inconsistent, erroneous information to field and within the Office of Public Instruction
- Duplication of effort
- Fragmented departments
- Low morale and productivity
- High level of frustration
- Wasted staff time and resources
- Reduced educational opportunities

## REQUIREMENT STATEMENT

Develop, communicate and implement management practices which establish the Office of Public Instruction as the leader for education in Montana.

### A. Solutions

- Develop and communicate goals and mission statement for the Office of Public Instruction
- Develop performance appraisals tied to the Office of Public Instruction's goals and mission statement
- Provide for staff input in job descriptions and performance appraisals
- Update job descriptions
- Increase management visibility
- Develop written policies and procedures
- Formalize the work planning process for management and staff
- Provide management practices training
- Implement a staff recognition program
- Combine staff in a single building

### B. Benefits

- Improved image for education and the Office of Public Instruction
- Better information to field and staff
- Reduced duplication of effort
- Reduced fragmentation between work units
- Improved morale/productivity
- Reduced level of frustration
- Better utilization of time and resources
- Improved educational opportunities

#### 4. TRAINING

##### CONCERN DEFINITION

Management and staff are not provided sufficient opportunity for training to do their jobs in the most effective manner.

##### A. Causes

- No needs assessments done for school districts
- No cross-training
- No backup for staff in training
- Job descriptions not current
- No orientation for new employees
- Training not timely and seldom available
- No accountability for training
- Release time not provided for training
- Insufficient resources allocated for training
- No individual training plans
- No training officer

##### B. Effects

- Decisions occasionally made with inadequate and inaccurate information
- Wasted staff and management time and resources
- Low productivity
- High staff frustration
- Low staff morale
- Staff unable to participate in training
- Staff unable to stay current with technology or trends in their fields
- Inconsistent direction to field and staff
- Loss of credibility
- Poor image for education
- Poor self-image
- Poor service to districts and legislature
- Loss of funding for educational programs

## REQUIREMENT STATEMENT

Assess, develop, implement and commit to a comprehensive staff and management training program which increases the effectiveness of the Office of Public Instruction staff and management.

### A. Solutions

- Identify training needs
- Provide backup for staff in training
- Update job descriptions
- Provide new employee orientation
- Provide timely training
- Communicate the training schedule
- Ensure training is available
- Provide release time for training
- Allocate sufficient resources for training
- Implement individual training plans
- Designate a training officer
- Provide cross training for employees

### B. Benefits

- Better decisions
- More effective use of time and resources
- Increased productivity
- Improve staff job satisfaction and morale
- Staff could participate in training and keep current with technology and trends in their fields
- Consistent direction to field and staff
- Improved credibility
- Better image for education
- Improved self-image for staff
- More effective service to districts and legislature
- Improved funding for educational programs

## 5. STATEWIDE INFORMATION NETWORK

### CONCERN DEFINITION

The Office of Public Instruction has an inadequate, incomplete information system which frequently makes access and distribution of information difficult or impossible.

#### A. Causes

- No common database
- Duplicative cumbersome forms
- Hardware incompatible
- Lack of standard data definitions
- Lack of training
- Inconsistent data collection time-lines
- Insufficient equipment
- Software incompatible
- Inadequate funding
- Lack of policies and procedures
- Limited or nonexistent feedback
- Timeliness and standards not enforced
- Data entry staffing insufficient

#### B. Effects

- Decisions occasionally made with inadequate or inaccurate information
- Wasted time for staff and management
- Loss of credibility
- Poor image for education
- Poor services to districts and legislature
- Low morale
- Loss of funding for educational programs
- Ineffective instruction
- Ineffective communication
- Missed educational opportunities for office and field staff
- Low productivity

## REQUIREMENT STATEMENT

Develop and implement a comprehensive, integrated information and communication system which allows for timely and accurate distribution of information.

### A. Solutions

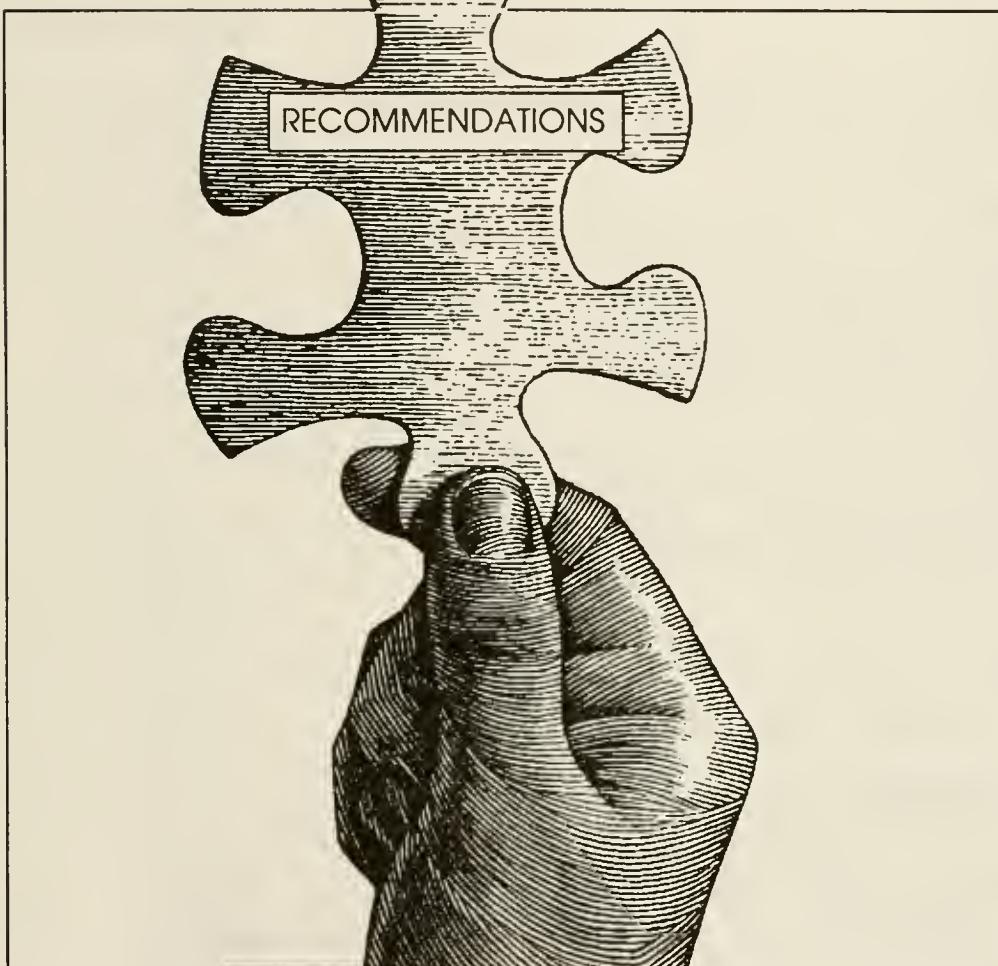
- Develop a common database
- Streamline forms
- Require hardware/software acquisition standards
- Require standard data definitions
- Provide and require training
- Require standard data collection time-lines
- Ensure adequate resources to operate the system
- Develop information policies and procedures
- Provide feedback
- Enforce time-lines and standards

### B. Benefits

- Better decisions
- More efficient use of time and resources
- Increased credibility
- Enhanced image for education
- Improved services to districts and legislature
- Improved morale
- Increased funding for education programs
- Improved student achievement through effective instruction
- Effective communication
- Improved productivity
- Improved educational opportunity



## OPI: PUTTING IT ALL TOGETHER





## **1. QUALITY OF EDUCATION**

### **CONCERN DEFINITION**

The educational system may not adequately prepare our students for today and for the future.

### **REQUIREMENT STATEMENT**

Develop an educational system which adequately prepares our students for today and for the future.

### **RECOMMENDATIONS**

- The Superintendent will communicate her vision for education (see requirement statement)
- Develop agreement on statewide educational goals, with the involvement of parents, business, teachers and other education staff
- Develop agreement on realistic, measurable expectations of students, teachers and supervisors
- Develop and implement district accountability standards, tied to expectations, with the involvement of parents, business, teachers and other education staff
- Through a needs assessment, determine resources necessary to accomplish the goals
- Ensure adequate resources are available to accomplish the goals, including appropriate training for teachers, principals and superintendents
- Provide adequate management training for school managers
- Provide adequate technical assistance for school districts
- Provide adequate funding
- Provide adequate curriculum materials for classroom teachers
- Provide an opportunity for classroom teachers to stay current in their fields
- Assess achievement of accountability standards through local, independent review team composed of parents, business persons and community members
- Provide recognition for effective schools, programs and teachers, tied to statewide educational goals
- Develop and implement an annual summer internship program for teachers

## 2. COMMUNICATIONS

### CONCERN DEFINITION

Communications are sometimes ineffective among staff, management, districts, other agencies, parents, community and businesses.

### REQUIREMENT STATEMENT

Develop effective two-way communications among staff, management, districts, other agencies, parents, community and businesses.

### RECOMMENDATIONS

- Develop and maintain a wide-area network of personal computers to facilitate communications among staff, management, other state agencies and the field
- Review, identify and address problems and needs of the office telephone system
- In order to significantly improve communications, implement the management leadership recommendations that relate to goals, objectives, performance appraisals, policies and job descriptions. Share results with staff
- Proceed with efforts to consolidate staff in one location
- Identify, establish and communicate roles and resources of management and staff, internally and externally
- Standardize reporting requirements, definitions and reporting deadlines, and share with staff and field
- Set up a partnership with businesses to sponsor teachers to work on curriculum development at the Office of Public Instruction in the summer
- Management will encourage and solicit two-way communications
- Explore methods for more effective communications with all constituents with emphasis on rural areas
- Provide information systems plan to all users
- Develop a needs assessment to better target publications to needs of audience
- Review the Office of Public Instruction's mailing lists and procedures, and take steps to ensure literature reaches the correct audience
- Management will schedule and conduct regular staff meetings
- Implement a comprehensive forms review process
- Ensure gathered data is shared with providers
- Publish good news about education
- Share the good things that happen in one building with other buildings on a monthly basis

### **3. MANAGEMENT LEADERSHIP**

#### CONCERN DEFINITION

Direction and leadership in education and office management practices are sometimes inadequate at the Office of Public Instruction.

#### REQUIREMENT STATEMENT

Develop, communicate and implement management practices which establish the Office of Public Instruction as the leader for education in Montana.

#### RECOMMENDATIONS

- Develop and communicate, with staff input, goals and mission statement for the Office of Public Instruction
- Finalize and communicate the goals and mission statement
- Meet with staff to explain mission and goals
- Distribute the goals and mission statements to the staff
- Task management in developing and implementing objectives to accomplish goals, with staff input, and mention specific due dates
- Superintendent Keenan explains her expectations of job descriptions, performance appraisals and work plans tied to goals and objectives
- Distribute goals and mission statement to:
  - Schools
  - Educational Agencies
  - Executive Branch
  - Others
  - Press
- Final approval of objectives by Superintendent Keenan
- Update job descriptions
- Meet with Department of Administration Classification Bureau to establish Office of Public Instruction organizational structure, classification system and develop benchmark positions
- Management communicates job expectations to each staff member
- Draft job descriptions are developed by staff based on above expectations
- With staff input, job descriptions are completed and signed by staff and management
- Personnel reviews are conducted to ensure consistency with classification system and bench mark positions. Position descriptions are forwarded to Superintendent Keenan
- Job descriptions are sent to classification
- Develop performance appraisals which include annual training needs assessments

- Define and adopt a standard written performance appraisal process based on position descriptions
- Train performance appraisers on process
- Implement performance appraisal process with annual reviews
- Provide for staff recognition based on performance appraisals
- Staff recognition process is developed
- Draft standards for recognition
  - job related
  - agency related
  - profession/community service
- Staff review and provide input
- Formalize recognition standards in policy
- Implement recognition program
- Formalize the work planning process for management and staff
- Develop standards and requirements for work planning which allow for frequent update and regular review of work plans
- Requirement to develop work plans communicated to staff by Superintendent Keenan
- Train staff and management on development of work plans
- Hold individuals accountable to work plan accomplishment through performance appraisals
- Develop written policies and procedures for the Office of Public Instruction
- Develop standard policy vehicle and process
- Review existing policies and procedures
- Rescind out-of-date policies
- Redraft existing policies in standard format
- Develop new policies where appropriate
- Provide for staff review
- Maintain current policy manual on network
- Provide for continual policy and procedure update
- Improve communications within the office and between the office and the field
- Increase management visibility
- Regular meetings should be held in each building
- Nancy and Jack need to attend building meetings
- Nancy and Jack need to be more visible to staff
- Obtain a single building for Office of Public Instruction staff
- Develop a cost benefit analysis
- Include a proposal for a single building in the executive budget process
- Develop legislative and school district support for the proposal
- Present single building proposal to legislature
- Provide management practices training

- Provide management training including but not limited to:
  - conflict resolution
  - time management
  - general management practices

#### **4. TRAINING**

##### **CONCERN DEFINITION**

Management and staff are not always provided sufficient opportunity for training to do their jobs in the most effective manner.

##### **REQUIREMENT STATEMENT**

Assess, develop, implement and commit to a comprehensive staff and management training program which increases the effectiveness of the Office of Public Instruction staff and management.

##### **RECOMMENDATIONS**

- Identify training needs
- Review updated job descriptions relative to staff training needs
- Develop needs assessments for training, both internally and in the field
- Implement individual training plans
- Provide cross training
- Ensure training is available and allocate sufficient resources
- Provide funding for training
- Provide backup for staff while in training
- Provide trainers
- Provide training facilities
- Hire a training officer
- Provide timely training
- Publish and distribute training schedule
- Ensure training is current with technology
- Require staff to attend training
- Provide support for staff in training
- Encourage supervisors to approve training
- Provide release time for training
- Provide backup while training
- Evaluate training offered to ensure it meets the needs of participants
- Adjust future training based on staff evaluations
- Provide orientation training for new employees
- Develop a standard orientation procedure with staff input
- Provide training to staff facilitating orientation sessions

## 5. STATEWIDE INFORMATION NETWORK

### CONCERN DEFINITION

The Office of Public Instruction has an inadequate, incomplete information system which frequently makes access and distribution of information difficult or impossible.

### REQUIREMENT STATEMENT

Develop and implement a comprehensive integrated information/communication system that allows for timely and accurate distribution of information.

### RECOMMENDATIONS

#### Phase I - Internal

- Draft an internal Office of Public Instruction information systems plan, with staff input, to address the following issues and priorities:
  - Area-wide access
  - Electronic communications
  - Electronic reporting/sharing information
  - Needs analysis for hardware/software
  - Data processing staffing requirements
  - Training needs for system implementation and operation
  - Cost of implementation
  - Time-lines
  - Honeywell conversion
- Develop system requirements and implement a common database, with staff input, addressing the following issues:
  - Standard data collection time-lines
  - Streamline/standardize forms
  - Standard data definitions
  - Data entry systems
  - Security and access provisions are considered
  - Naming conventions/programming standards
  - Adequate backup procedures
  - History files/archives/retention
  - Identify data sources and data users
  - Identify storage locations for data
  - Identify staff responsibilities

- Draft and keep current, with staff input, information policies and procedures. Policies and procedures should include at a minimum:
  - Computer hardware/software acquisition standards
  - Reporting time-lines and standards
  - Access and security
  - Backup and documentation
  - Ongoing maintenance
  - Currency (continued training on hardware/software)
  - Help desk for system problems/questions
  - Training for all staff utilizing data
  - Systems development (building computer programs)
  - Applications conversion (convert Honeywell)
  - Systems architecture (how everything fits together)
- Ensure adequate resources for the continued operation of the wide-area network and information database systems considering the following issues:
  - Annually update the information systems plan
  - Perform a needs analysis of existing resources/systems
  - Budget for systems acquisitions
- Provide and require training for all system users considering the following issues:
  - Conduct a training needs assessment
  - Develop a training plan
  - Provide backup for trainees
  - Ensure adequate resources for training
  - Assess functionality of training (post training assessment)
  - Revise curriculum based on assessment

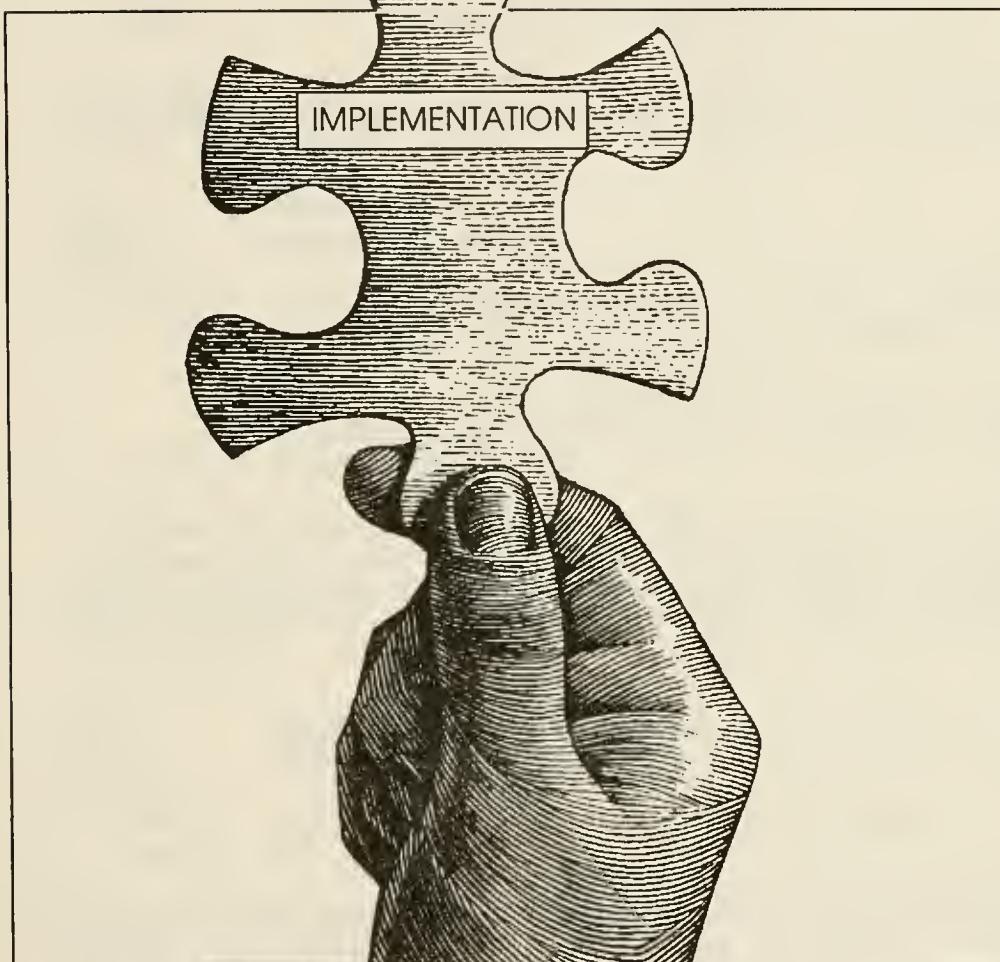
#### Phase II - External (Field)

- Draft an external Office of Public Instruction information systems plan to address the following issues and priorities:
  - Statewide access
  - Electronic communications
  - Electronic reporting/sharing information
  - Needs analysis for hardware/software
  - Data processing staffing requirements
  - Training needs for system implementation and operation
  - Cost of implementation
  - Time-lines
  - Honeywell conversion

- Develop an information database considering the following issues and requirements:
  - Standard data collection time-lines
  - Streamline/standardize forms
  - Standard data definitions
  - Data entry systems
  - Security and access provisions
  - Naming conventions/programming standards
  - Adequate backup procedures
  - History files/archives/retention
  - Identify data sources and data users
  - Identify storage locations for data
  - Identify field responsibilities
- Draft information policies and procedures. Policies and procedures should include at a minimum:
  - Computer hardware/software acquisition standards
  - Reporting time-lines and standards
  - Access and security
  - Backup and documentation
  - Ongoing maintenance
  - Currency (continued training on hardware/software)
  - Help desk for system problems/questions
  - Training for all users utilizing data
  - Systems development (building computer programs)
  - Applications conversion (convert Honeywell)
  - Systems architecture (how everything fits together)
- Ensure adequate resources for the continued operation of the wide-area network and information database systems in the field, considering the following issues:
  - Review and update the information systems plan
  - Perform a needs analysis of existing resources/systems
  - Budget for systems acquisitions
- Provide and require training for all systems users considering the following issues:
  - Conduct a field training needs assessment
  - Develop a field training plan
  - Ensure OPI has adequate resources to provide training
  - Assess field training (post training assessment)
  - Revise field training curriculum based on assessment

- Provide feedback to field on information collected including:
  - Develop an assessment of field needs and capabilities
  - Develop an implementation plan consistent with the Office of Public Instruction's ability to provide feedback

## OPI: PUTTING IT ALL TOGETHER





## **1. QUALITY OF EDUCATION**

Develop an educational system that adequately prepares our students for today and for the future.

- A. Communicate vision for education (see requirement statement).

Who: Nancy Keenan  
When: March 1, 1990  
Cost:  
Staff: 120 staff @ 1 hour = 120 hours  
Funds: \$200 materials and mailing

- B. Develop agreement on statewide educational goals with the involvement of parents, business community, teachers and other educational staff.

Who: Jack Copps  
When: March 10, 1990  
Cost:  
Staff: 6 staff from November 10, 1989 to March 16, 1990, equivalent 1 FTE 10.75 months  
Nancy/Jack 1.5 months each  
Dori 2.5 months, Alicia 2.5 months, Holly 1.75 months, Word Processing/Mail Room 3.5 wks  
Funds: \$ 8,258.43

- C. Develop realistic, measurable expectations of students, teachers and supervisors. (It is expected that districts would establish local expectations. The staff person assigned below would develop legislation, models and formats.)

Who: Director of Certification and Accreditation  
When: October 1, 1990  
Cost:  
Staff: 1 person @ 60 days = 60 staff days  
Funds: \$0

- D. Develop and implement district accountability standards, tied to expectations and state funding, with the involvement of parents, business community, teachers and other educational staff.

Who: Director of Certification and Accreditation  
When: May 29, 1992  
Cost:  
Funds: Estimated \$150,000 to the State  
Estimated additional cost per district  
Staff: 1 person @ 30 days = 240 hours  
Funds: \$ 1500 training and printing

E. Through a needs assessment, determine resources necessary to accomplish the statewide educational goals.

Who: Jack Copps  
When: March 31, 1992  
Cost:

Staff: 1 person @ 1,040 hours = 1,040 hours  
Estimated additional cost per district  
Staff: 1 person @ 10 days = 80 hours  
Funds: \$0

F. Provide adequate resources to accomplish the statewide educational goals including:

- Appropriate training for teachers, principals, superintendents, and trustees
- Adequate management training for school managers
- Adequate technical assistance for school districts
- Adequate funding
- Adequate curriculum materials for classroom teachers
- Opportunity for classroom teachers to stay current in their area

Who: Nancy Keenan  
When: 1993 Legislative session  
Cost: Determined as a result of the needs assessment in item E above.

G. Assess achievement of accountability standards through local, independent review teams which include parents, business community and other community members.

Who: Director of Certification and Accreditation  
When: Start: August 1992  
Stop: August 1993; annually thereafter  
Cost:  
Funds: \$100,000  
Estimated additional cost per district  
Staff: 5 person @ 5 days = 25 days review information and draft report  
1 person @ 30 days = 30 days assemble information and support committee  
Total = 440 hours  
Funds: \$0

- H. Provide recognition for effective schools, programs and teachers, tied to statewide educational goals.

Who: Nancy Keenan

When: Annually, beginning August, 1993

Cost:

Funds: Cost to state = \$8,000 for travel and per diem for winners to attend televised awards conference, including cost of conference

Cost of awards:

Option 1: Superficial recognition program  
\$100 per district @ 100 districts = \$10,000

Option 2: Foundation program bonus of 5 percent to top 100 districts eligible. Estimated annual cost \$20 million

- I. Develop and implement an annual summer internship program for 20 teachers. Investigate the possibility of business sponsored scholarships to support teachers working in the Office of Public Instruction to assist in developing curriculum materials.

Who: Gail Gray

When: May 1, 1990 begin

Cost: \$ 34,000 yr.

Includes cost of salary, rent, telephone, travel

## 2. COMMUNICATIONS

Develop effective two-way communications among staff, management, districts, other agencies, parents, community and businesses.

- A. Develop and maintain a wide-area network of personal computers among the Office of Public Instruction buildings to facilitate communications among staff, management, other state agencies and school districts.

Who: Scott Buswell  
When: Communication between Office of Public Instruction buildings by January 31, 1990.  
Skeletal OPI network completion by March 30, 1990. Total network completion by July 1, 1991.

Cost: \$ 90,300  
Staff: 1.5 staff @ 1.3 years = 4,056 hours  
Funds: \$90,300 from various sources which include:  
Modems/software for dial in/out capability  
Uninterruptable power supplies/servers  
Portable VGA projector  
High speed print capability  
Lan manager software  
Laser printers (1300, training room,  
School Foods)  
Network Assistant computer  
311 Meg disk storage capitol  
File server 1300 downstairs  
Data base server for foundation program,  
etc.

- B. Assist county superintendents to acquire personal computers and equipment necessary to attach them to the local area network.

Who: Scott Buswell  
When: July 1, 1991 (Available to districts upon addition of 1 staff by Legislature.)  
Cost:  
Staff: 1 person @ 2,080 hours = 2,080 hours annually  
Funds: \$4,000 travel and training  
Costs per County Superintendent:  
CPU \$2,500 + Modem \$200 + Printer \$830 +  
Software \$1,000 = \$4,530

- C. Make PSINet available to Montana schools.
- Who: Scott Buswell  
When: Available July 1991  
Cost:  
Staff: 1 person 10 percent of the time = 208 hours  
Funds: \$200 per school or district
- D. Review, identify, address problems and needs in the office telephone system.
- Who Gregg Groepper  
When Begin analysis, January 5, 1990. (Estimated completion January 31, 1990)  
Cost:  
Staff: 30 staff @ 1 day = 240 hours  
Funds: \$0 for review  
Cost of correction unknown
- E. Upgrade the Office of Public Instruction telephone system to include voice mail.
- Who: Gregg Groepper  
When: July 2, 1990  
Cost:  
Staff: 120 staff @ 3 hours training = 360 hours  
Funds: \$35,000
- F. In order to significantly improve communications, implement the management leadership recommendations that relate to goals, objectives, performance appraisals, policies and job descriptions. Share results with staff.
- Who: Nancy Keenan  
When: First phase completed, March 1, 1990  
Cost:  
Staff: 5 staff @ 1 day = 40 hours  
Funds: \$0
- G. Proceed with efforts to consolidate staff in one location.
- Who: Gregg Groepper  
When: Spring 1991  
Cost:  
Staff: 320 hours (included in "J" of Management Leadership)  
Funds: \$5 million (included in "J" of Management Leadership)

H. Publish, internally and externally, information which identifies roles and resources of management and staff.

Who: Sanna Kiesling  
When: August 1, 1990  
Cost:  
Staff: 1 person @ 30 days = 240 hours  
Funds: \$10,000 copies of document @ \$3 to \$10 =  
\$30,000 to \$100,000  
(a fee could be charged)

I. Standardize reporting requirements, definitions and deadlines, and share with staff and field.

Who: Dori Nielson  
When: December 31, 1990  
Cost:  
Staff: 1 person @ 6 months = 1,040 hours  
Funds: \$0

J. Approval of unit work objectives should include processes to ensure effective communications within the Office of Public Instruction and between the Office of Public Instruction and the school districts.

Who: Nancy Keenan  
When: Completion, February 19, 1990  
Cost:  
Staff: All staff full-time  
Funds: \$ Depends on unit objectives

K. Develop recommendations for more effective communications with all constituents with emphasis on rural areas. Effective communications include, but are not limited to, telecommunications, bulletin boards and publications.

Who: Ron Lukenbill  
When: July 2, 1990  
Cost:  
Staff: 1 person = 30 days  
Funds: \$0

L. Distribute information systems plan to all users.

Who: Scott Buswell  
When: June 1, 1990  
Cost:  
Staff: 1 person @ 2 days = 16 hours  
Funds: \$200 (copy each section + on network)

M. Develop a needs assessment to better target publications to specific audiences.

Who: Sanna Kiesling  
When: June 29, 1990  
Cost:  
Staff: 1 person @ 20 days = 160 hours  
Funds: \$1,000

N. Review the Office of Public Instruction mailing lists and procedures, and take steps to ensure publications reach the correct audience.

Who: Sanna Kiesling  
When: June 29, 1990  
Cost:  
Staff: 1 person @ 20 days = 160 hours  
Funds: \$0

O. Implement a comprehensive forms review process.

Who: Dori Nielson  
When: Ongoing. Initial completion, December 31, 1990. Updated annually  
Cost:  
Staff: Initial period: 1 person @ 6 months = 1,040 hours. Annual cost 30 days per year  
Funds: \$0

P. Ensure gathered data is shared with providers.

Who: Dori Nielson  
When: Consistent with "E" in Statewide Information System  
Cost: Consistent with "E" in Statewide Information System

Q. Develop a process to distribute good news about education.

Who: Sanna Kiesling  
When: March 1, 1990  
Cost:  
Staff: 1 person @ 3 days = 24 hours  
Funds: Cost identified with distribution

R. Require managers to hold monthly staff meetings.  
Schedule and hold semi-annual, all staff meetings.

Who: Nancy Keenan

When: March 1, 1990

Cost:

Staff: 120 staff @ 2 hours per month = 2,880 hours

Funds: \$0

**3. MANAGEMENT LEADERSHIP**

Develop, communicate and implement management practices which establish the Office of Public Instruction as the leader for education in Montana.

- A. Develop and communicate, with staff input, goals and mission statement for the Office of Public Instruction.

Who: Nancy Keenan  
When: January 5, 1990  
Cost:  
    Staff: 120 staff @ 1 hour = 120 hours  
              15 staff @ 8 hours = 120 hours  
              2 staff @ 8 hours = 16 hours  
                        Total = 256 hours  
    Funds: \$200 estimated for printing/distribution

- B. Develop department objectives consistent with office goals and mission statement.

Who: Jack Copps ]  
      Gail Gray   ] with staff input  
      Gregg Groepper]  
When: February 5, 1990  
Cost:  
    Staff: 120 staff @ 2 days = 1,920 hours  
    Funds: \$0

- C. Department objectives approved and included in performance appraisals.

Who: Nancy Keenan  
When: February 19, 1990  
Cost:  
    Staff: 2 staff @ 2 days = 32 hours  
    Funds: \$0

- D. Establish completion dates and formats for job descriptions, performance appraisals and work plans consistent with office goals and mission statement.

Who: Nancy Keenan  
When: March 1, 1990  
Cost:  
    Staff: 3 staff @ 7 days = 168 hours  
    Funds: \$0

E. Complete staff workload analysis study.

Who: Curly Burns, Team Leader  
Mike Chapman, Team Analyst  
When: March 2, 1990  
Cost:  
Staff: 1 person @ 20 days design/analysis  
1 person @ 5 days coordination/report  
120 staff @ .5 hours survey response  
Total = 260 hours  
Funds: \$0

F. Complete job descriptions, performance appraisals and work plans.

Who: Nancy Keenan  
When: May 1, 1990  
Cost:  
Staff: 1 person 4 days job description + 1 day per person performance appraisal + 2 days work plan per person = 7 days per staff person @ 120 staff  
Total = 6,720 hours

G. Develop an employee recognition program.

Who: Ken Toole  
When: October 1, 1990  
Cost:  
Staff: 1 person @ 10 days = 80 hours  
Funds: \$0

H. Develop a written policy/procedures manual.

Who: Ken Toole  
When: May 30, 1990  
Cost:  
Staff: 1 person @ 30 days development  
10 staff @ 1 day review  
Total = 320 hours  
Funds: \$0

I. Increase management visibility.

Who: Nancy Keenan  
Jack Copps  
When: Immediately  
Cost:  
Staff: 1 person @ 6 meeting per month = 72 hours  
Funds: \$0

J. Consolidate staff into a single location.

Who: Gregg Groepper  
When: 1991 Legislative session  
Cost:  
Staff: 2 staff @ 20 days = 320 hours  
Funds: \$5 million

K. Develop management practices training program.

Who: Ken Toole  
When: June 1, 1990 (on completion of management performance appraisal)  
Cost:  
Staff: 1 person @ 5 days = 40 hours  
Funds: Determined on completion of performance appraisal

#### 4. TRAINING

Assess, develop, implement and commit to a comprehensive staff and management training program which increases the effectiveness of the Office of Public Instruction staff and management.

- A. Ensure training needs are identified for all staff.

Who: Ken Toole  
When: May 1, 1990 (consistent with performance appraisals)  
Cost:  
Staff: 1 person @ 2 days = 16 hours  
Funds: \$0

- B. Management staff ensure training is available and budget sufficient resources. (This task consists of the Superintendent communicating to management, through their performance appraisals, her intent to hold them accountable for the provision of training.)

Who: Nancy Keenan  
When: March 9, 1990  
Cost:  
Staff: 4 person @ 2 hours = 8 hours  
Funds: \$0

- C. Develop a reporting system to track training, position descriptions and performance appraisals.

Who: Ken Toole  
When: May 1, 1990  
Cost:  
Staff: 1 person @ 2 days = 16 hours  
Funds: \$0

- D. Manage the reporting system for training and performance appraisals.

Who: Ken Toole  
When: Annually, beginning May 1, 1990  
Cost:  
Staff: 1 person @ 1 day per month = 96 hours  
Funds: \$0

E. Ensure support is provided for staff in training.

Who: Nancy Keenan

When: May 1, 1990

Cost:

Staff:

Training: FY 1992, 2 weeks per person; 1 week on network and software, 1 week professional development = 9,600 hours

Backup: Assumes administrative assistants, word processing, mail room, AV library staff and similar positions are provided backup 35 staff @ 80 hours = 2,800 hours

Total = 12,400 hours (approximately 6 FTE)

Funds: Will vary depending on tuition costs for training

F. Evaluate training, with participant input, to ensure it meets the needs of participants. Adjust future course offerings accordingly.

Who: Ken Toole

When: Ongoing, beginning May 1, 1990

Cost: 1 person @ 1 day per month = 96 hours

G. Develop a new employee orientation program, specific to the Office of Public Instruction, with staff input.

Who: Gail Gray

When: March 31, 1990

Cost:

Staff: 1 person @ 5 days = 40 hours

Funds: \$0

## **5. STATEWIDE INFORMATION NETWORK**

Develop and implement a comprehensive, integrated information/communication system that allows for timely and accurate distribution of information.

**A. Draft information systems plan.**

Who: Scott Buswell  
When: April 30, 1990  
Cost:  
    Staff: 1 person @ 15 days = 120 hours  
    Funds: \$0

**B. Draft information systems policies.**

Who: Scott Buswell  
When: May 15, 1990  
Cost:  
    Staff: 2 staff @ 5 days = 10 staff days  
    Funds: \$ (to be determined in information systems plan)

**C. Develop a common database for the Office of Public Instruction.**

Who: Dori Nielson  
When: December 31, 1990  
Cost:  
    Staff 1 person @ 6 months = 1,040 hours  
    Funds \$0

**D. Ensure adequate resources, including data processing staff training, are available to operate the system.**

Who: Nancy Keenan  
When: 1991 Legislative session  
Cost:  
    Staff: \$ 14,400 Yearly subscription service

\$ 452,000 equipment replacement. \$452,000 \* .10 = \$ 45,200 per year equipment replacement. Per year calculated at .10% replacement per year. Life of a P.C calculated at 10 years. The 10 year life is the very maximum expected life for a P.C.

Staff training (5 days) first year, following years (2.5 days) 5 \* 130 = 650 \* 8 hours = 5,208 hours first year, 2604 remaining years

Currency training data processing staff (2 weeks per year 6 \* 1500 = \$ 9,000 includes travel, tuition, fees.

Network staff to operate wide-area network (one per 35 machines would equal 3 staff to maintain network)

Software: Maintain currency with WordPerfect 5.1, WordPerfect Office, Fox Base, DOS, Lotus, OS2 network software \$ 6,000 per year.

On site equipment maintenance for personal computers and printers, \$ 29,788 per year. This assumes all equipment changed to standard IBM color workstations and standard printers.

Total maintenance costs \$104,388

- E. Develop a plan for providing feedback to the field on information collected.

Who: Dori Nielson  
When: Start April 1991, complete July 1, 1991  
Cost:  
Staff: 1 person @ 30 days = 240 hours  
Funds: \$0



## Appendices



## **Staff Invitation Letters**



The following letter was sent to each staff member working at the Office of Public Instruction as of November 6, 1989.

November 6, 1989

TO: ^F1^  
FROM: Nancy Keenan  
SUBJECT: Office of Public Instruction Study

You are about to participate with me in a study of the Office of Public Instruction. I am primarily interested in identifying areas of your satisfaction and concern so that more effective programs and practices may be considered for implementation. Your input is vital to the success of this project.

As part of the study, the attached survey is designed to obtain your opinions and ideas concerning problems, recommendations and benefits which may affect the Office of Public Instruction. In order to ensure the success of the project, I encourage you to provide your perspective of the Office of Public Instruction environment. Therefore, the best answer to each question is the one which most closely reflects your own personal opinion. All of the responses will be kept confidential.

Please complete the enclosed survey and bring it with you to a follow-up interview. The follow-up interviews will be conducted in group sessions. You will participate in the interview with nine of your colleagues and the study team.

You are scheduled for a one-hour group interview at ^F2^ on ^F3^, in the conference room at 1300 11th Avenue.

If you have questions concerning the survey, please talk to one of the study team members listed below.

|                |                   |
|----------------|-------------------|
| Julia Brighton | Nancy Coopersmith |
| Nona Rens      | Gregg Groepper    |
| Curly Burns    | Scott Buswell     |

co/  
Attachment



## School District Invitation Letters



The following letter was sent to school district personnel in the Flathead Valley who were nominated for Office of Public Instruction study interviews.

November 6, 1989

^F1^

Dear ^F2^

Thank you for agreeing to participate with me in a study of the role of the Office of Public Instruction. I am primarily interested in identifying areas of your satisfaction and concern so that more effective programs and practices may be considered for implementation. Your input is vital to the success of this project.

As part of the study, the attached survey is designed to obtain your opinions and ideas concerning problems, recommendations and benefits which may affect the Office of Public Instruction. In order to ensure the success of the project, I encourage you to provide your perspective of the Office of Public Instruction environment. Therefore, the best answer to each question is the one which most closely reflects your own personal opinion. All of the responses will be kept confidential.

Please complete the enclosed survey and bring it with you to a follow-up interview. The follow-up interviews will be conducted in group sessions. You will participate in the interview with nine colleagues from your area and the study team.

You are scheduled for a one-hour group interview from 11:30 a.m.-12:30 p.m. on Wednesday, November 15, 1989, at the Eagle Bend Golf Course Meeting Room in Bigfork. Lunch will be on us.

If you have questions concerning the survey, please call 444-3095 and ask one of my study team members to call you at a time convenient to you. For your information, my study team members are:

Julia Brighton  
Nona Rens  
Curly Burns

Nancy Coopersmith  
Gregg Groepper  
Scott Buswell

co/  
Attachment

cc: ^F3^



## Survey Questions



SURVEY QUESTIONS OFFICE OF PUBLIC INSTRUCTION STAFF

The following cover sheet and survey questions were provided to all Office of Public Instruction staff who agreed to participate in the Office of Public Instruction study.

OFFICE OF PUBLIC INSTRUCTION STUDY

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Telephone: \_\_\_\_\_

Work Location:  1227  1300  Capitol  1230  AV

Which one category comprises at least 51 percent of your average daily work.

Accounting

Data/Word Processing

Administrative Assistant

Clerical

Curriculum/Program Specialist

Supervisory/Managerial

Other, explain \_\_\_\_\_

**SURVEY QUESTIONS  
OFFICE OF PUBLIC INSTRUCTION STUDY**

Please attach additional pages as necessary.

1. What concerns you about the Office Of Public Instruction today?

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- a. What recommendations would you make to avoid these problems in the future?

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2. In your opinion, what specific problems/concerns prevent the Office of Public Instruction from being most effective?

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- a. What specific recommendations would you make to solve the problems/concerns you presented?

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3. What problems do you face accomplishing your assigned tasks?

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4. What problems do you face working as an integral part of the Office of Public Instruction?

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5. How can the Office of Public Instruction improve communications with school districts?

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6. Are there other ways the Office of Public Instruction can improve its relationship with school districts?

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7. How can the Office of Public Instruction improve internal communication?

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8. What do you need to perform your job more effectively?  
(equipment, information, training, programs, etc.)

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9. If you could change one thing in your job, what would it be?

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10. If your recommendations were implemented, what benefits would be realized by the Office of Public Instruction? Please state your benefits in terms of time, money, resources, staffing, effectiveness, productivity, etc.

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11. If your recommendations were implemented, what benefits would be realized by education in Montana. Please state your benefits in terms of time, money, resources, staffing, effectiveness, productivity, etc.

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12. If we implement your recommendations, what benefits could we expect in one year?

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13. If we implement your recommendations, what benefits could we expect in five years?

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14. Of the recommendations you have made, which is the most important recommendation for the Superintendent of Public Instruction to implement?

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15. Of these recommendations you have made, which is most important to you?

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16. What recommendation would you implement quickly, even though it may not be a high priority?

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17. What resources are presently available to implement any of the recommendations listed above?

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#### **SCHOOL DISTRICT SURVEY QUESTIONS**

The following cover sheet and survey questions were provided to all school district personnel who agreed to participate in the Office of Public Instruction study.

OFFICE OF PUBLIC INSTRUCTION STUDY

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Which one category comprises at least 51 percent of your average daily work for the school district.

Teacher K-8

Teacher 9-12

Trustee

School District Central Administration  
(Superintendent, Business Clerk, etc.)

Building Principal

Other, explain \_\_\_\_\_

SCHOOL DISTRICT SURVEY QUESTIONS  
OFFICE OF PUBLIC INSTRUCTION STUDY

Please attach additional pages as necessary.

1. What concerns you about the Office Of Public Instruction today?

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- a. What recommendations would you make to avoid these problems in the future?

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2. In your opinion, what specific problems/concerns prevent the Office of Public Instruction from being most effective?

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- a. What specific recommendations would you make to solve the problems/concerns you presented?

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3. What problems do you have being effective in your school district?

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4. How can the Office of Public Instruction assist you in accomplishing your assigned tasks?

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5. What problems do you face working with the Office of Public Instruction?

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- a. What recommendations would you suggest to resolve these problems?

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6. How can the Office of Public Instruction improve communications with school districts?

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7. Are there other ways the Office of Public Instruction can improve its relationship with school districts?

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8. What do you need to perform your job more effectively?  
(equipment, information, training, programs, etc.)

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9. If you could change one thing in your job, what would it be?

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10. If your recommendations were implemented, what benefits would be realized? Please state your benefits in terms of time, money, resources, staffing, effectiveness, productivity, etc.

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11. If we implement your recommendations, what benefits could we expect in one year?

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12. If we implement your recommendations, what benefits could we expect in five years?

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13. Of the recommendations you have made, which is the most important recommendation for the Superintendent of Public Instruction to implement?

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14. Of these recommendations you have made, which is most important to you?

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15. What recommendation would you implement quickly, even though it may not be a high priority?

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16. What resources are presently available to implement any of the recommendations listed above?

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## Oral Interview Questions



The following interview questions were used by the study team to conduct the Office of Public Instruction staff and school district oral interviews.

**INTERVIEW QUESTIONS  
OFFICE OF PUBLIC INSTRUCTION STUDY**

1. In your opinion, what specific problems/concerns prevent the Office of Public Instruction from being most effective?
2. What specific recommendations would you make to solve the problems/concerns you presented?
3. If your recommendations were implemented, what specific benefits would be realized?
4. In your judgment, what is the most important recommendation for the Office of Public Instruction to implement?

**OFFICE OF PUBLIC INSTRUCTION  
STUDY AND BASE NOTES AVAILABILITY**

The report and base notes compiled during the interview process of the Office of Public Instruction Study are available at the Resource Center, or on the local area network. If you desire to look at a copy of the study or base notes on the local area network change your directory in WordPerfect to: T:\USERS\BASENOTE\\*.\* and edit the file named OPI.RPT or BASENOTE.OPI.

For those individuals not skilled in the use of WordPerfect you can enter WordPerfect via the network main menu. Select option E when you reach the WordPerfect Shell.

When the blank screen appears with a line like " Doc 1 Pg 01 Ln 1" Pos 1.1" appears on the bottom of the screen hit your F5 key once. The F5 key will display your default directory. Hit the enter key once to display this directory.

At the bottom of the screen in the lower left hand corner you will see something that looks like "Q:\USERS\XXXXXX\\*.\*" where XXXXX is your name. Change the "Q" to a "T", the XXXX to "BASENOTE" by moving your cursor to the XXXXX using the arrow keys and typing the word BASENOTE right after the \ and in front of the XXXX (or your name).

Then delete your name using the delete key on the right hand side of the keyboard. The line should appear as follows when you are finished: T:\USERS\BASENOTE\\*.\*

When the line appears as above hit the enter key. A screen will appear that lists the file BASENOTE. Move the highlighted bar around the screen with your arrow keys until the word BASENOTE.OPI or OPI.RPT is highlighted. Then hit the enter key to select the member.

Once you have the text on the screen you may use the page up or page down keys to move around the document. When you want to leave just hit the F7 key until you reach the main network menu again.



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tration, Helena, MT.